



# Android Consideration

Likely Purchasers and Recent Purchasers



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**EXHIBIT 1766.R**

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**EXHIBIT 1766.R-001**



# Study Timeline



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# Methodology



## Research Objectives

- Track key brand funnel metrics
- Discover most influential factors in purchase decision
- Uncover why buyers migrated from purchase plan
- Determine retailers purchased from



## Sample

- Internet Population 18+
- Likely purchasers in next 6 months (n~1,500)
- Recent purchasers in the last 3 months (~n=650)



## Timing

- An unbranded survey with the pre wave fielded on YouGov panels from March 26th - April 5th



## Weighting

- Weighted to a sampling frame of Internet population, 18+
- Frame source: CPS 2019
- Weight adjusted to OS benchmarks using the Gallup World Survey 2019

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# Tiering Methodology

## Model Tiering Using Retail Price of Smartphone

Smartphone device models that likely purchasers are considering, or models that recent purchasers purchased were used to tier. The retail price of the model was used to tier the respondent into 4 buckets: Ultra Premium (\$950+), Premium (\$700-\$950), Mass Premium (\$400-\$699), Mid/Low (\$200-\$399), Low (<\$200). Model classifications shown below.

Ultra Premium (\$950+)	Premium (\$700-\$950)	Mass Premium (\$400-\$699)	Mid (\$200-\$399)	Low (<\$200)
Samsung Galaxy S21 Samsung Galaxy Z Flip Samsung Galaxy Fold Samsung Note 20 Ultra Samsung Note 21 Ultra Apple iPhone 12 Pro Apple iPhone 12 Pro Max Huawei Mate 40 Pro LG V40 ThinQ LG GbX ThinQ Motorola Edge	Samsung Galaxy S20 Samsung Galaxy S21 Xiaomi Mi 11 OnePlus 9 OnePlus 8 Oppo Find X3 Google Pixel 5 Sony Xperia 5 II XTE Axon 10 Pro Apple iPhone 12 Apple iPhone 11 Pro Apple iPhone 11 Pro Max Apple iPhone 12 Mini	Samsung Galaxy S9 Samsung Galaxy A72 Samsung Galaxy A51 Google Pixel 4a 5G Apple iPhone 11 Honor View 20 Honor 10 Nokia 9 Pureview Apple iPhone X Apple iPhone XR Apple iPhone XS Apple iPhone XS Max	Samsung Galaxy S8, A21s, A52, A32 SHARP sense4, sense5G Xiaomi Redmi Note 10 Apple iPhone SE, 8, 8 Plus Google Pixel 3a Honor 9 Huawei P40 Lite LG Stylo 6 Oppo A52 OnePlus Nord Sony Xperia L2 Xiaomi Mi 9T Pro ZTE Axon 7 Nokia 8.3 5G Motorola Moto G 5G Plus	Samsung Galaxy A11, S6, S7 Xiaomi Redmi Note 9 Google Pixel 3 Oppo A72 Honor 7X Huawei P20 Lite LG K51 OnePlus Clover Sony Xperia XZ2 Compact ZTE Blade Max View Nokia 2.4 Motorola Moto E Alcatel GO Flip 3, 1C Logiocom L-248 Apple iPhone 4, 4s, 5, 5c, 5s, 6, 6 Plus, 6s, 6s Plus, 7, 7 Plus

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# Tiering Methodology

Three tiering methods were evaluated for classifying respondents into Mid/Low (Less than \$400), Mass Premium (\$400-699), Premium (\$700-950), and Ultra Premium (\$950+) tiers.

Layman	Pricing (Upfront) OR Pricing (Monthly)		Models
Which of the following best describes the new smartphone that you think you will/did purchase? Please select one response. <ul style="list-style-type: none"> <li>- Top-of-the-line smartphone with the most advanced capabilities</li> <li>- Meets all my needs, but not best of the best</li> <li>- Meets my most important needs and is within my budget, even though it doesn't have everything I want</li> <li>- Affordable smartphone with basic capabilities</li> </ul>	How much will you most likely spend/did you spend for your recent smartphone purchase? <ul style="list-style-type: none"> <li>- Less than \$200</li> <li>- \$200-299</li> <li>- \$300-\$399</li> <li>- \$400-\$699</li> <li>- \$700-\$950</li> <li>- More than \$950</li> <li>- Not Sure</li> </ul>	How much will you most likely/did you spend on this smartphone purchase including any carrier charges and data plan? Please provide your best estimate. <ul style="list-style-type: none"> <li>- Less than \$64 per month</li> <li>- \$64-72 per month</li> <li>- \$73-\$85 per month</li> <li>- \$86-\$95 per month</li> <li>- More than \$95 per month</li> <li>- Not sure</li> </ul>	Which device model would you most likely/did you purchase? Please select one only. <ul style="list-style-type: none"> <li>- OEM Model List characterized into Low, Mid, Mass Premium, Premium, Ultra Premium</li> </ul>
<b>Conclusion:</b> Too subjective	<b>Conclusion:</b> Good method for tiering, but classifications get muddy when coupled with monthly pricing options	<b>Conclusion:</b> Too many assumptions for monthly contract resulting in an increase in error.	<b>Conclusion:</b> Close proxy for price which tiering is based on

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# Tiering Approach: Next Steps

While the model tiering method has been implemented for March - May waves, an additional approach will be evaluated after the June wave.

Step 1: Questions added to June surveys that combines Price + Model	Step 2: Evaluate Price + Model tiering method	Step 3: Confirm tiering approach
<p><b>Likely Purchasers:</b> How much will you <i>most likely</i> spend on this smartphone purchase? Please provide your best estimate.</p> <p><b>Recent Purchasers:</b> How much did you spend for your recent smartphone purchase?</p> <p><b>Response options combine Price with Model examples:</b></p> <ul style="list-style-type: none"> <li>- Up to \$299 (e.g., Samsung Galaxy A11, iPhone 7, Google Pixel 3, Xiaomi Redmi Note 9)</li> <li>- \$300 - \$399 (e.g., iPhone SE, Google Pixel 4a, Motorola one fusion+)</li> <li>- \$400 - \$699 (e.g., Google Pixel 4a 5G, Samsung A51, iPhone 12 mini)</li> <li>- \$700 - \$950 (e.g., Samsung S21, OnePlus 8, Google Pixel 5, iPhone 12)</li> <li>- More than \$950 (e.g., Samsung Note 20 Ultra, Samsung Galaxy Fold, iPhone 12 Pro)</li> </ul>	<ul style="list-style-type: none"> <li>● Determine if consumers can self-classify into a price tier using Price + Model question</li> <li>● Compare fidelity of Price + Model question approach versus the model tiering method already implemented</li> <li>● Recommend if Price + Model question should replace model tiering method</li> </ul>	<ul style="list-style-type: none"> <li>● If Price + Model question has good fidelity to the model tiering method, decide which method to adopt for future waves</li> <li>● If Price + Model question has poor fidelity to the model tiering method, determine if additional approaches for tiering classification should be pursued</li> </ul>

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# Key Takeaways

## Metrics

Among [Likely Purchasers](#) and [Recent Purchasers](#), Samsung and Apple lead the competitive set for all funnel metrics.

[About half \(49%\) of Likely Purchasers intend to buy an Apple phone](#). A [similar proportion of Recent Purchasers \(47%\) purchased an Apple phone](#).

For Likely Purchasers, [Apple has the highest OEM consideration and intent](#) across all premium tiers, but is weaker at the mid/low tier, while Samsung's consideration and intent is fairly balanced across tiers. LG consideration is comparatively lower than Apple's and Samsung's at every tier.

## Switchers

[Roughly one-fifth](#) of iOS (22%) and Android (17%) users are considering the other OS.

Device users are loyal to their OS: just 9% of iOS likely purchasers [intend to switch](#) to an Android, while 7% of Android likely purchasers [intend to switch](#) to an iOS device.

OS switching behavior is limited, yet the [rate of switching OS is 2 times higher for switchers to iOS](#) (12%) than switchers to Android (6%).

## Retailer and Purchase Sources

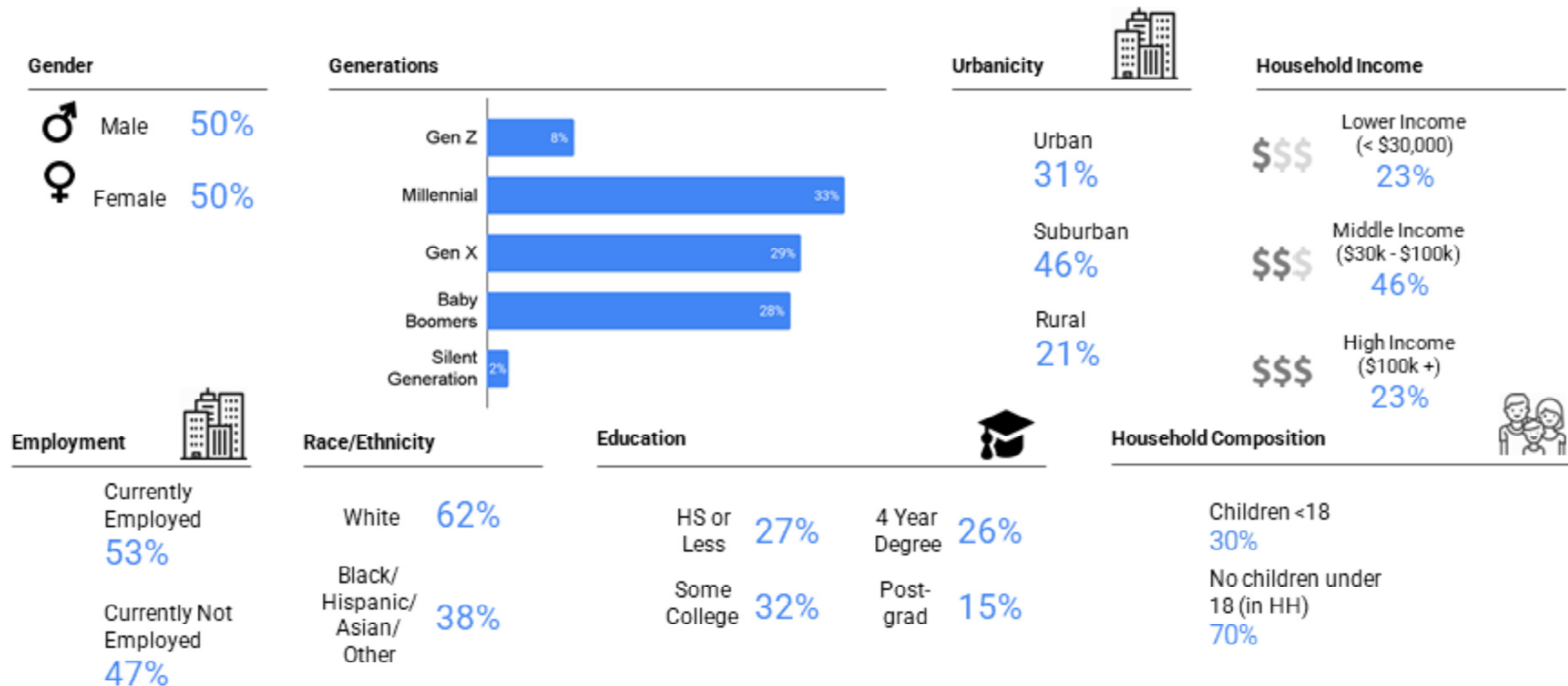
[About two-thirds \(64%\)](#) of Recent Purchasers bought their phone upfront.

[The smartphone brand](#) was the top purchase reason (28%), with more recent Android purchasers buying because the device was affordable (32% vs 20% for iOS purchasers).

Family and friends (59%), online shopping sites (58%), and retail stores (52%) [were most influential](#) in the purchase with [internet ads](#) being more influential with recent Android purchasers (35% vs 26% for iOS purchasers).

For trended data, please see the [Android Consideration Key Metrics Trix](#)

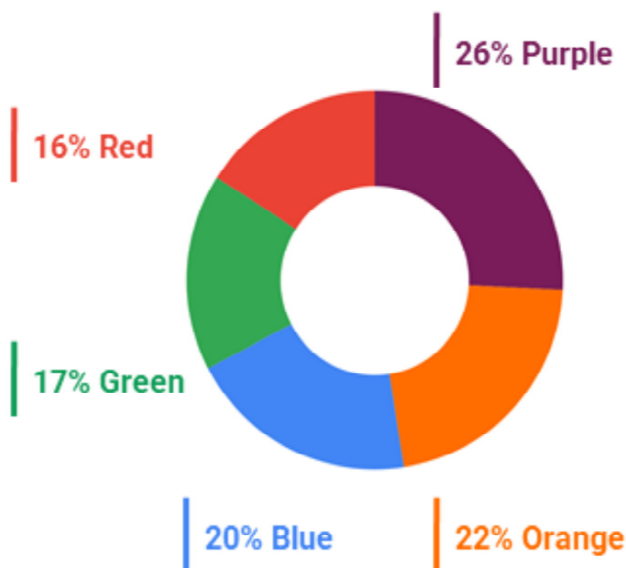
# Likely Purchasers: a snapshot





## Likely Purchasers: a snapshot

SEGMENTS:



### Purchase Timeframe

20%

In Next  
Month

80%

Next 2-3  
Months

### Methods for Purchasing Smartphone

\$\$\$

53%

Purchase  
Upfront

\$\$\$

36%

Purchase  
Monthly

\$\$\$

11%

I Don't  
Know

### Top 3 Data Plans

40%

Unlimited

11%

3-5 GB

9%

6-10 GB

## Tiering\*

Premium Ultra  
(34%)



37% / 61%

Premium  
(27%)

39% / 61%

Mass Premium  
(16%)

31% / 66%

Mid  
(15%)

49% / 46%

Low  
(8%)

63% / 29%

### Operating System



45%



52%

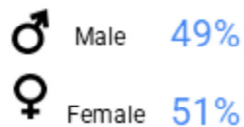
\*OS within each tier is the participant's primary phone OS, not reflective of current sales

- Tiering is done by model, skews Android vs other studies we do with similar screening criteria.

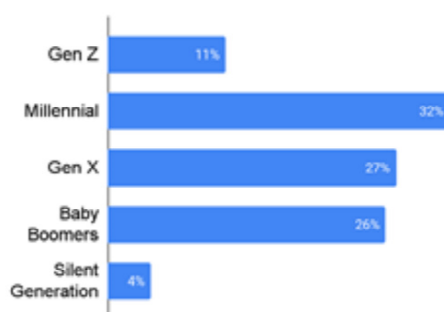
# Recent Purchasers: a snapshot



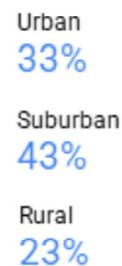
## Gender



## Generations



## Urbanicity



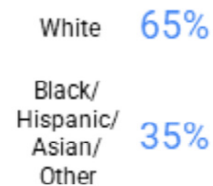
## Household Income



## Employment



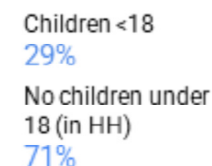
## Race/Ethnicity



## Education



## Household Composition

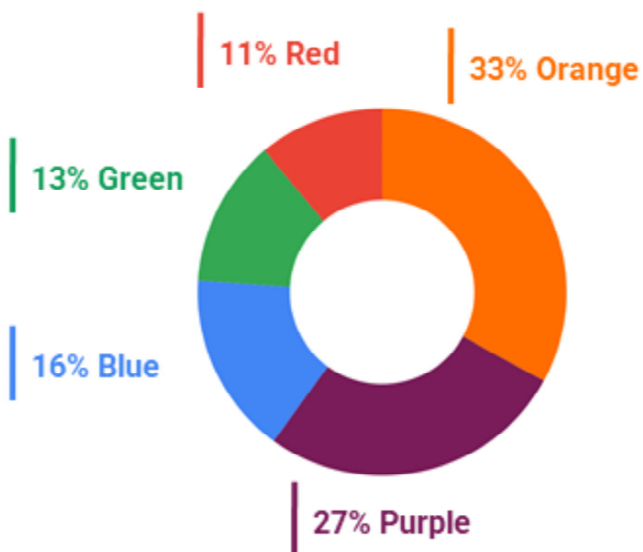






## Recent Purchasers: a snapshot

SEGMENTS:



### Switch Carriers

No	Yes
79%	21%

### Methods for Purchasing Smartphone

Purchase Upfront	Purchase Monthly
64%	36%

### Top 3 Data Plans

Unlimited	3-5 GB	6-10 GB
32%	12%	8%

## Tiering\*



Tier	Android	Apple
Premium Ultra (17%)	25%	75%
Premium (25%)	35%	65%
Mass Premium (21%)	31%	69%
Mid (22%)	53%	43%
Low (15%)	76%	24%

### Operating System

Android	Apple
47%	49%

\*OS within each tier is the participant's primary phone OS

- Tiering is done by model
- OS - 4% said "i don't know"



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# OEM Key Metrics

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## Likely Purchasers March 2021: Key OEM and OS Metrics

Funnel Metrics for Priority OEMs						
Top OEMs	Unaided Awareness	Aided Awareness	OEM Familiarity	OEM Favorability	Purchase Consideration	Purchase Intent
Samsung	71%	92%	60%	72%	51%	29%
Apple	64%	92%	69%	70%	59%	49%
LG	32%	83%	38%	52%	27%	8%
Google	19%	68%	30%	46%	19%	3%

Consideration and Intent by Price Tier						
Price Tier	Apple Consider	Samsung Consider	LG Consider	Apple Intent	Samsung Intent	LG Intent
Ultra Premium (\$950+)	68%	50%	22%	59%	34%	4%
Premium (\$700-950)	71%	46%	15%	60%	24%	1%
Mass Premium (\$400-699)	78%	47%	18%	67%	24%	0%
Mid/Low (<\$400)	46%	53%	38%	34%	21%	15%

Lower Funnel Metrics by Key Android Devices			
Android hero devices	Consider	Intent	Purchase*
<b>Samsung</b> Galaxy S21, S21+, ZFlip, Fold, S20, A52, A72, Note Ultra, 21 Ultra	27%	16%	TBD
<b>Pixel</b> 4a, 5	10%	2%	TBD
<b>OnePlus</b> 9, 8	2%	1%	TBD

Lower Funnel Metrics of Potential Switchers			
Current OS	Consider other OS	Intend other OS	Switched*
Apple iOS	22%	9%	TBD
Android	17%	7%	TBD

- Samsung and Apple lead across funnel metrics.
- Roughly one-fifth of iOS (22%) and Android (17%) users are considering the other OS for their next purchase.

\*Switched and Purchase data will come from recontact

- Base Sizes
- Funnel Metrics for Priority OEMs
- Unaided Awareness (Asked among all respondents, % of total, n=1,279)
- Aided Awareness (Asked among all respondents, % of total, n=1,279)
- Familiarity (Asked among awares, % of awares)
  - Samsung (n=1,190)
  - Apple (n=1,166)
  - LG (n=1,083)
  - Google (n=881)
- Favorability (Asked among awares, % of awares)
  - Samsung (n=1,186)
  - Apple (n=1,164)
  - LG (n=1,081)
  - Google (n=878)
- Consideration (Asked among awares, n=1,279)
- Purchase Intent (Asked among those considering, n=1,278)
- Consideration Intent by Price Tier
  - Ultra Premium (n=342)
  - Premium (n=276)
  - Mass Premium (n=158)
  - Mid/Low (n=236)
- Questions
- Unaided Awareness
  - When you think of companies who manufacture smartphones, which brands come to mind? (Asked of both Likely Purchasers and Recent Purchasers)
- Aided Awareness
  - Which of the following smartphone brands have you heard of? (Asked of both Likely Purchasers and Recent Purchasers)
- Familiarity
  - How familiar are you with each of the following smartphone brands? (Asked of both Likely Purchasers and Recent Purchasers)

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- Brands that respondents are aware of are shown here)
- Favorability
  - Which best describes how you feel about each of the following smartphone brands? (Asked of both Likely Purchasers and Recent Purchasers. Brands that respondents are aware of are shown here)
- Consideration
  - When purchasing this smartphone, which smartphone brand(s) will you consider? (Asked of Likely Purchasers)
  - Which brand(s) of smartphone did you consider purchasing? Be sure to include the brand of smartphone that you actually purchased. (Asked of Recent Purchasers)
- Purchase Intent (Purchase Preference)
  - Of the smartphone brands you will consider purchasing, which one would you most likely choose? (Asked of Likely Purchasers. If multiple brands are selected in Consideration, the respondent will see this list and will be asked to select which brand they are most likely to purchase. Select one only. If the respondent only selects one brand in Consideration, then this respondent will be auto punched into this question.)
  - What brand of smartphone did you purchase?(Asked of Recent Purchasers)
- Android Hero Devices
- Samsung
- Samsung Galaxy S21
- Samsung Galaxy S21+
- Samsung Galaxy Z Flip
- Samsung Galaxy Fold
- Samsung Galaxy S20
- Samsung Galaxy A52
- Samsung Galaxy A72
- Samsung Galaxy Note Ultra
- Samsung Galaxy 21 Ultra
- OnePlus
- OnePlus 9
- OnePlus 8
- Google Pixel
- Pixel 4a
- Pixel 5



## Likely Purchasers March 2021: Additional OS Metrics

### Likely Purchaser OS Funnel Metrics

<u>Top OSs</u>	Aided Awareness	OS Familiarity	OS Consider	% Purchased Device
Android	89%	67%	54%	n/a
iOS	82%	68%	55%	n/a

### Likely Purchaser OS Funnel Metrics by OEM

<u>OEM Owners</u>	iOS Familiarity	Android Familiarity	iOS Consider	Android Consider
Apple owners	92%	44%	95%	21%
Samsung owners	35%	89%	19%	91%

### Likely Purchaser OS Funnel Metrics by Generation

<u>Generation</u>	iOS Familiarity	Android Familiarity	iOS Consider	Android Consider
Gen Z	84%	71%	68%	45%
Millennial	74%	70%	62%	51%
Gen X	69%	70%	52%	58%
Baby Boomers	55%	60%	48%	55%

### Funnel Metrics by Price Tier

<u>Price Tier</u>	iOS Consider	Android Consider	iOS Purchase	Android Purchase
Ultra Premium (\$950+)	65%	49%	TBD	TBD
Premium (\$700-950)	67%	49%	TBD	TBD
Mass Premium (\$400-699)	73%	46%	TBD	TBD
Mid/Low (<\$400)	44%	62%	TBD	TBD

- Android consideration and intent is higher among older generations, while iOS has higher consideration and intent among Gen Z.
- Android intent is higher than iOS among Mid/Low tier likely purchasers, and iOS has higher purchase intent among Premium tier purchasers.

- Base Sizes
- Likely Purchaser OS Funnel Metrics
- Aided Awareness (n=1,279)
- Familiarity
  - Android (n=1,171)
  - iOS (n=1,019)
  - Consideration (n=1,278)
- Likely Purchaser OS Funnel Metrics by OEM
- Apple Owners (n=617)
- Samsung Owners (n=310)

- Likely Purchaser OS Funnel Metrics by Generation
- Gen Z (n=100)
- Millennial (n=422)
- Gen X (n=371)
- Baby Boomers (n=353)
- Funnel Metrics by Price Tier
- Ultra Premium (n=342)
- Premium (n=276)
- Mass Premium (n=158)
- Mid/Low (n=236)



## Recent Purchasers March 2021: Key OEM and OS Metrics

Funnel Metrics for Priority OEMs						
Top OEMs	Unaided Awareness	Aided Awareness	OEM Familiarity	OEM Favorability	Purchase Consideration	Purchase
Samsung	65%	81%	58%	68%	41%	25%
Apple	63%	83%	68%	68%	52%	47%
LG	27%	69%	39%	48%	17%	8%
Google	14%	58%	31%	48%	14%	4%
Lower Funnel Metrics by Key Android Devices						
Android hero devices						Purchase
<b>Samsung</b> Galaxy S21, S21+, Z Flip, Fold, S20, A52, A72, Note Ultra, 21 Ultra						10%
<b>Pixel</b> 4a, 5						2%
<b>OnePlus</b> 9, 8						0%

Funnel Metrics by Price Tier				
Price Tier	iOS Considered	Android Considered	iOS Purchased	Android Purchased
Ultra Premium (\$950+)	73%	50%	68%	32%
Premium (\$700-950)	71%	48%	66%	34%
Mass Premium (\$400-699)	73%	50%	69%	31%
Mid/Low (<\$400)	41%	72%	35%	65%

Switchers		
Old OS	Consider other OS	Switched
Apple iOS	23%	6%
Android	22%	12%

- Android has a greater share of Mid/Low tier phone purchases than iOS, yet iOS has a greater proportion of purchases at the Premium tiers.
- Switching behavior is 2x higher for switching from Android to iOS than for switchers to Android from iOS.

- Base Sizes
- Funnel Metrics for Priority OEMs
- Unaided Awareness (n=650)
- Aided Awareness (n=650)
- Familiarity
  - Samsung (n=538)
  - Apple (n=513)
  - LG (n=459)
  - Google (n=389)
- Favorability
  - Samsung (n=538)
  - Apple (n=514)
  - LG (n=459)
  - Google (n=390)
- Consideration (n=650)
- Purchase (n=646)

- Funnel Metrics by Price Tier
  - Ultra Premium (n=80)
  - Premium (n=124)
  - Mass Premium (n=99)
  - Mid/Low (n=210)
- Android Hero Devices
  - Samsung
    - Samsung Galaxy S21
    - Samsung Galaxy S21+
    - Samsung Galaxy Z Flip
    - Samsung Galaxy Fold
    - Samsung Galaxy S20
    - Samsung Galaxy A52
    - Samsung Galaxy A72

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- Samsung Galaxy Note Ultra
- Samsung Galaxy 21 Ultra
- OnePlus
- OnePlus 9
- OnePlus 8
- Google Pixel
- Pixel 4a
- Pixel 5



## Recent Purchasers March 2021: Additional OS Metrics

Recent Purchaser OS Funnel Metrics					
<u>Top OSs</u>	Aided Awareness	OS Familiarity	OS Consideration	% Purchased Device	
Android	82%	65%	64%	53%	
Apple iOS	75%	62%	52%	47%	

Recent Purchaser OS Funnel Metrics by OEM						
<u>OEM Owners</u>	iOS Familiarity	Android Familiarity	iOS Consideration	Android Consideration	iOS Purchased	Android Purchased
Apple owners	83%	40%	91%	32%	90%	10%
Samsung owners	34%	88%	16%	96%	6%	94%

Recent Purchaser OS Funnel Metrics by Generation						
<u>Generation</u>	iOS Familiarity	Android Familiarity	iOS Consideration	Android Consideration	iOS Purchased	Android Purchased
Gen Z	82%	62%	60%	54%	58%	42%
Millennial	73%	73%	50%	73%	41%	59%
Gen X	53%	71%	45%	68%	42%	58%
Baby Boomers	55%	55%	56%	57%	51%	49%

- Most Apple and Samsung recent purchasers owners remain loyal to the OEM, yet Apple owners have higher consideration of another ecosystem than Android owners.
- iOS is the most purchased OS for Gen Z, while Android was the most purchased for Millennials and Gen X.

- Base Sizes
- Recent Purchaser OS Funnel Metrics
- Aided Awareness (n=)
- Familiarity
  - Android (n=)
  - iOS (n=)
  - Consideration (n=)

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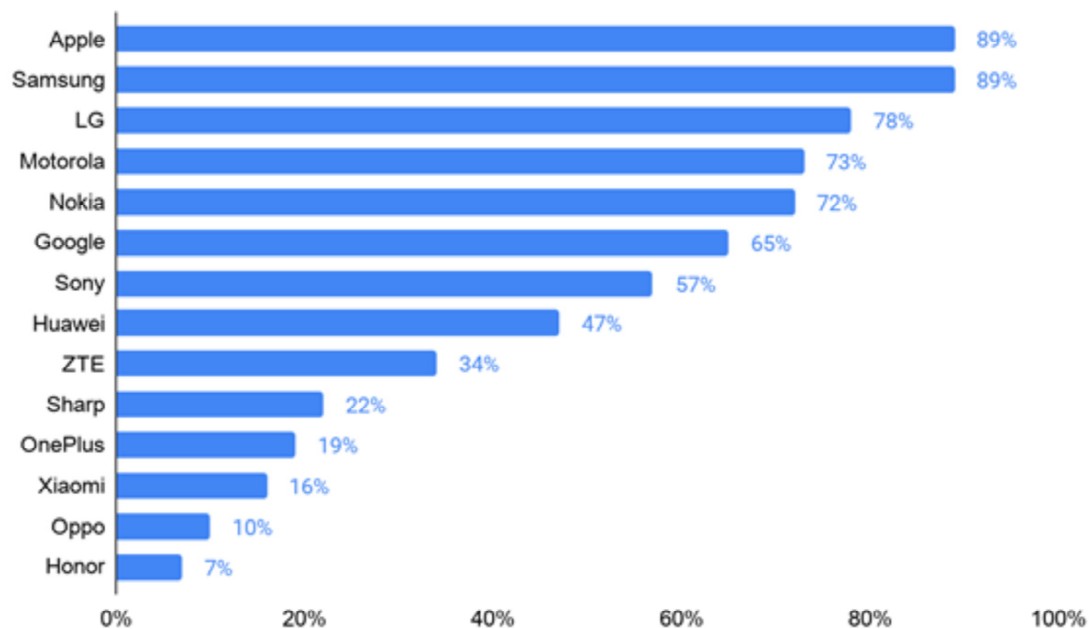
# OS / OEM Metrics

Google





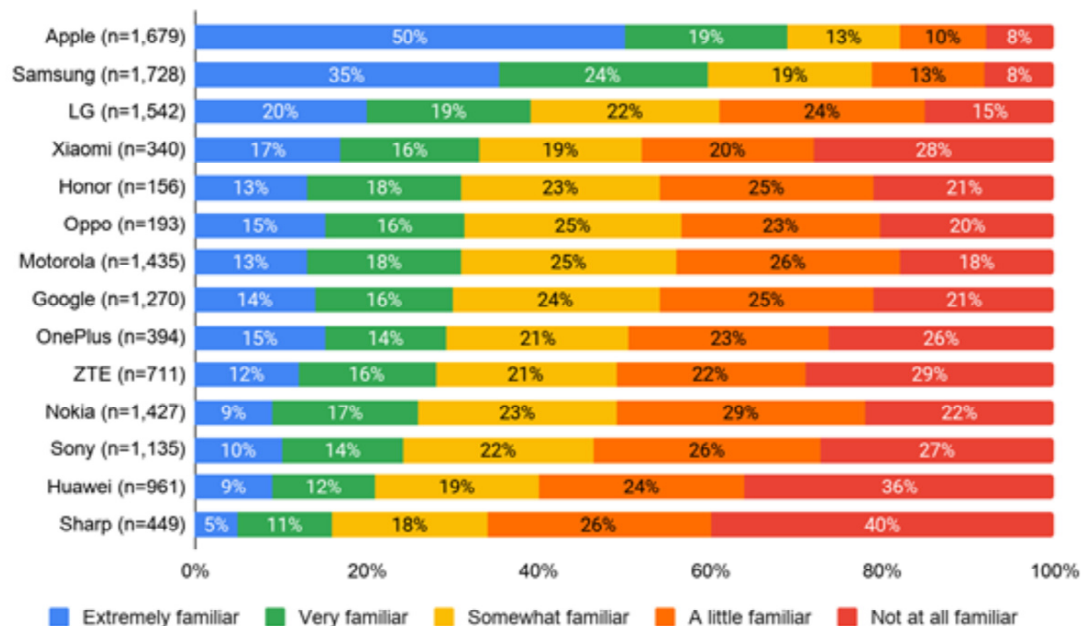
## Samsung and Apple lead for aided awareness



Google Which of the following smartphone brands have you heard of? Asked of all (n=1,929).



## Familiarity of Samsung and Apple is the highest



Google How familiar are you with each of the following smartphone brands? Asked of awares.



## Younger ages have higher familiarity with most smartphones than older generations

	Gen Z (a)	Millennial (b)	Gen X (c)	Baby Boomers (d)
Apple	87% (b,c,d)	76% (a,c,d)	68% (a,b,d)	56% (a,b,c)
Samsung	66% (d)	66% (d)	61% (d)	50% (a,b,c)
LG	40%	44% (d)	42% (d)	30% (b,c)
Google	42% (c,d)	41% (c,d)	27% (a,b,d)	17% (a,b,c)
Sony	30% (d)	34% (c,d)	23% (b,d)	12% (a,b,c)
Nokia	30% (d)	35% (c,d)	26% (b,d)	16% (a,b,c)
Motorola	26%	33% (d)	35% (d)	26% (b,c)
Huawei	20% (b)	35% (a,c,d)	15% (b)	9% (b)

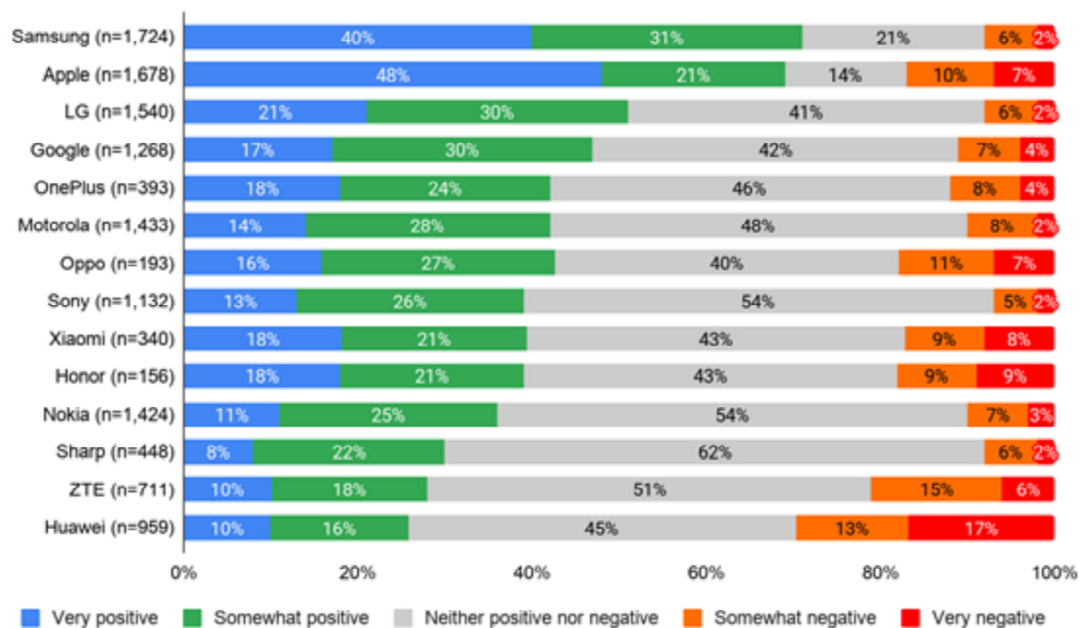
Google How familiar are you with each of the following smartphone brands? Asked of awares. Top 2 box shown.  
Lowercase letters indicate statistically significant to group

- Base Sizes
- Gen Z
  - Apple (n=136)
  - Samsung (n=125)
  - LG (n=96)
  - Google (n=97)
  - Sony (n=81)
  - Nokia (n=86)
  - Motorola (n=83)
  - Huawei (n=61)
- Millennial
  - Apple (n=532)
  - Samsung (n=549)
  - LG (n=482)
  - Google (n=433)
  - Sony (n=401)
  - Nokia (n=451)
  - Motorola (n=434)
  - Huawei (n=353)
- Gen X
  - Apple (n=486)
  - Samsung (n=510)
  - LG (n=481)
  - Google (n=389)
  - Sony (n=317)
  - Nokia (n=431)
  - Motorola (n=451)
  - Huawei (n=293)
- Baby Boomers
  - Apple (n=485)
  - Samsung (n=501)
  - LG (n=445)
  - Google (n=332)
  - Sony (n=308)
  - Nokia (n=425)

- Motorola (n=437)
- Huawei (n=242)



## Samsung and Apple lead for favorability



Google Which best describes how you feel about each of the following smartphone brands? Asked of awares



## Samsung's favorability spans all age groups, while Apple and Google favorability skews younger

	Gen Z (a)	Millennial (b)	Gen X (c)	Baby Boomers (d)
Apple	73%	73% (c,d)	67% (b)	66% (b)
Samsung	72%	72%	68%	73%
Google	51%	54% (c,d)	41% (b)	42% (b)
LG	40% (c,d)	49%	53% (a)	52% (a)
Nokia	39%	39% (d)	34%	32% (b)
Sony	36%	45% (d)	38%	36% (b)
Huawei	36% (c,d)	41% (c,d)	18% (a,b,d)	11% (a,b,c)
Motorola	32% (c)	41%	46% (a)	43%

Google Which best describes how you feel about each of the following smartphone brands? Asked of awares. Top 2 box shown.  
Lowercase letters indicate statistically significant to group

- Base Sizes
- Gen Z
  - Apple (n=135)
  - Samsung (n=124)
  - LG (n=95)
  - Google (n=97)
  - Sony (n=80)
  - Nokia (n=85)
  - Motorola (n=82)
  - Huawei (n=60)
- Millennial
  - Apple (n=531)
  - Samsung (n=547)
  - LG (n=481)
  - Google (n=431)
  - Sony (n=399)
  - Nokia (n=449)
  - Motorola (n=432)
  - Huawei (n=352)
- Gen X
  - Apple (n=486)
  - Samsung (n=510)
  - LG (n=481)
  - Google (n=389)
  - Sony (n=317)
  - Nokia (n=431)
  - Motorola (n=451)
  - Huawei (n=293)
- Baby Boomers
  - Apple (n=485)
  - Samsung (n=501)
  - LG (n=445)
  - Google (n=332)
  - Sony (n=308)
  - Nokia (n=425)

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- Motorola (n=437)
- Huawei (n=242)



Mid/Low tier are most likely to favor LG over other tiers. Mid/Low tier are least likely to favor Apple compared to all other tiers.

	Premium Ultra (a)	Premium (b)	Mass Premium (c)	Mid/Low (d)
Apple	79% (d)	77% (d)	80% (d)	64% (a,b,c)
Google	48%	48%	51%	50%
Huawei	30%	24%	22% (d)	31% (c)
LG	47% (d)	44% (d)	50% (d)	62% (a,b,c)
Samsung	76% (b)	66% (a,c)	76% (b)	72%
Sony	43%	37%	37%	43%

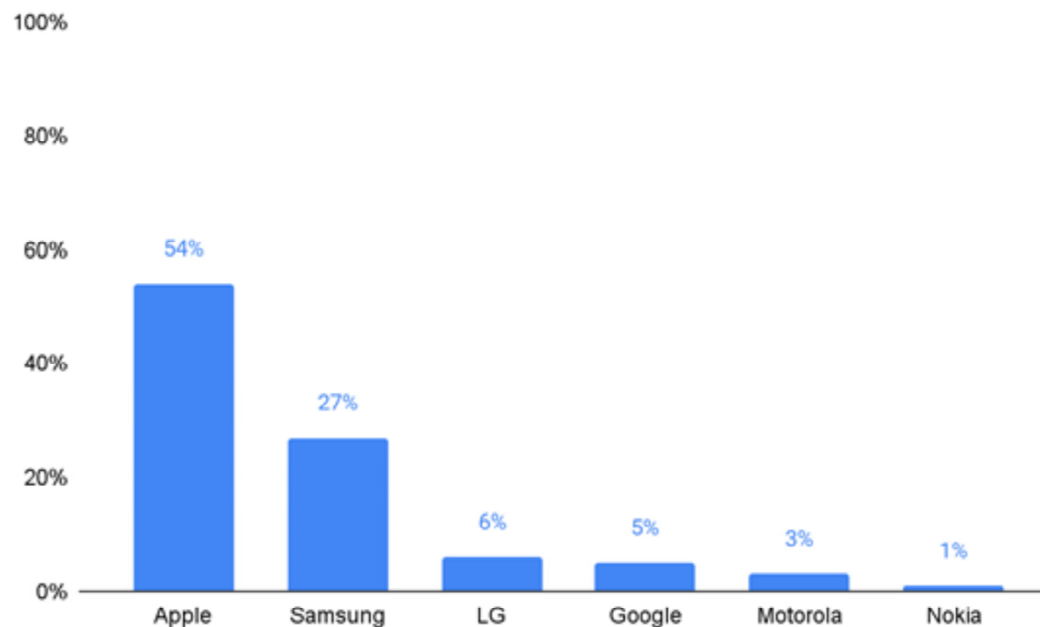
Google Which best describes how you feel about each of the following smartphone brands? Asked of awares. Top 2 box shown.  
Tiering is based on models and lowercase letters indicate statistically significant to group.

- Apple
- Premium Ultra (n=392)
- Premium (n=373)
- Mass Premium (n=233)
- Mid/Low (n=336)
- Google
- Premium Ultra (n=297)
- Premium (n=297)
- Mass Premium (n=176)
- Mid/Low (n=254)
- Huawei
- Premium Ultra (n=231)
- Premium (n=207)
- Mass Premium (n=129)
- Mid/Low (n=211)
- LG
- Premium Ultra (n=352)
- Premium (n=332)
- Mass Premium (n=193)
- Mid/Low (n=318)
- Samsung
- Premium Ultra (n=394)
- Premium (n=365)
- Mass Premium (n=227)
- Mid/Low (n=368)
- Sony
- Premium Ultra (n=260)
- Premium (n=245)
- Mass Premium (n=153)
- Mid/Low (n=236)





## Among likely purchasers who are considering both iOS and Android, Apple leads purchase preference



Google Of the smartphone brands you will consider purchasing, which one would you most likely choose? Please select one only. Likely purchasers who consider both iOS and Android (n=200).

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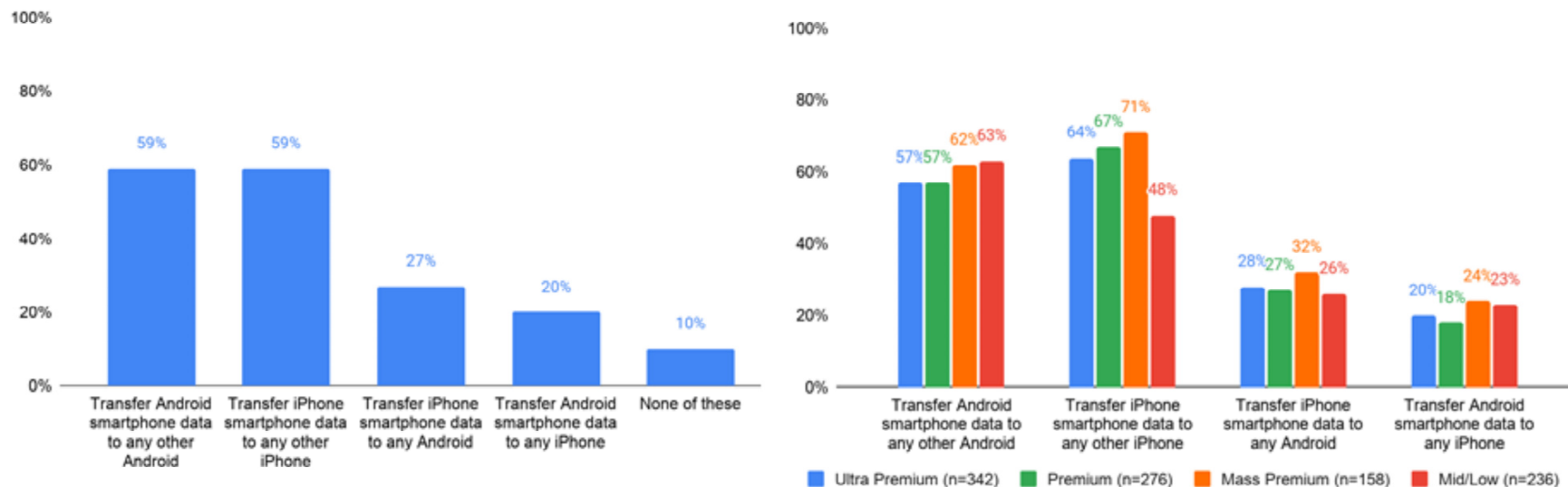
Likely  
Purchasers

Google



# More than half of likely purchasers are aware you can transfer data across devices in the same ecosystem

One quarter or fewer think data from a device can be transferred across ecosystems.



Google

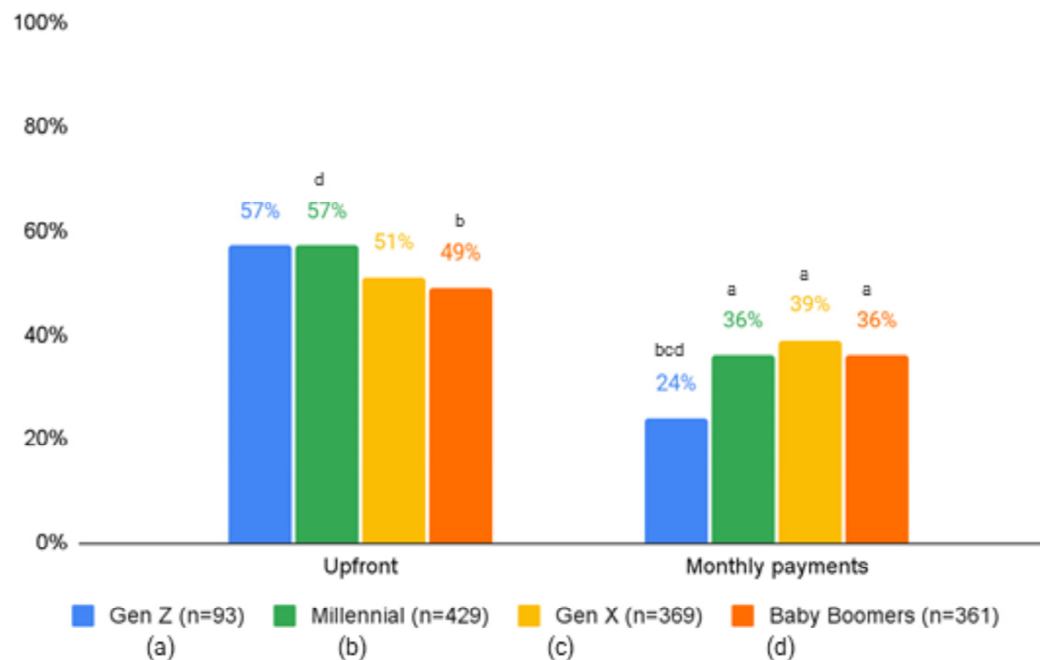
Based on what you know or have heard, which of the following statements is true? Select all that apply. Asked of likely purchasers (n=1,279).

Tiering is based on models and lowercase letters indicate statistically significant to group.

- Tier Definitions:
- Ultra Premium (\$950+)
- Premium (\$700-\$950)
- Mass Premium (\$400-\$699)
- Mid/Low (Less than \$400)



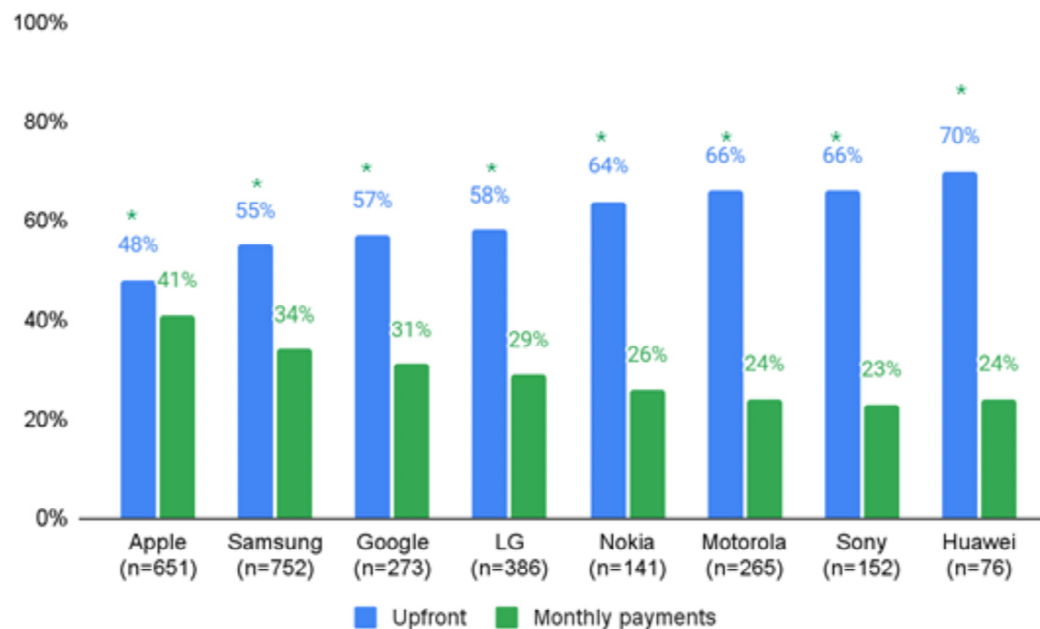
Among likely purchasers, Gen Z are the least likely to say they will use monthly payments to purchase a smartphone



Google Which of the following best describes how you think you will purchase this smartphone? Asked of likely purchasers.  
Lowercase letters indicate statistically significant to group



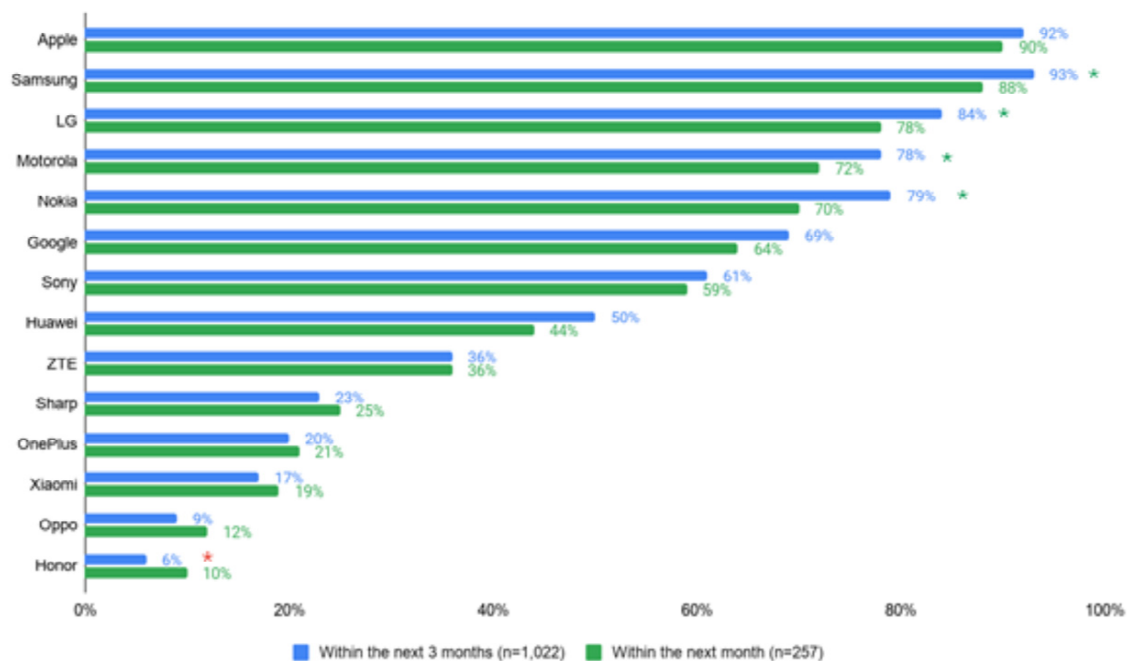
## Fewer than half of those considering an Apple smartphone plan to purchase the device outright



Google Which of the following best describes how you think you will purchase this smartphone? Asked of likely purchasers.  
 \*/\* indicates statistically significant differences compared to monthly payments



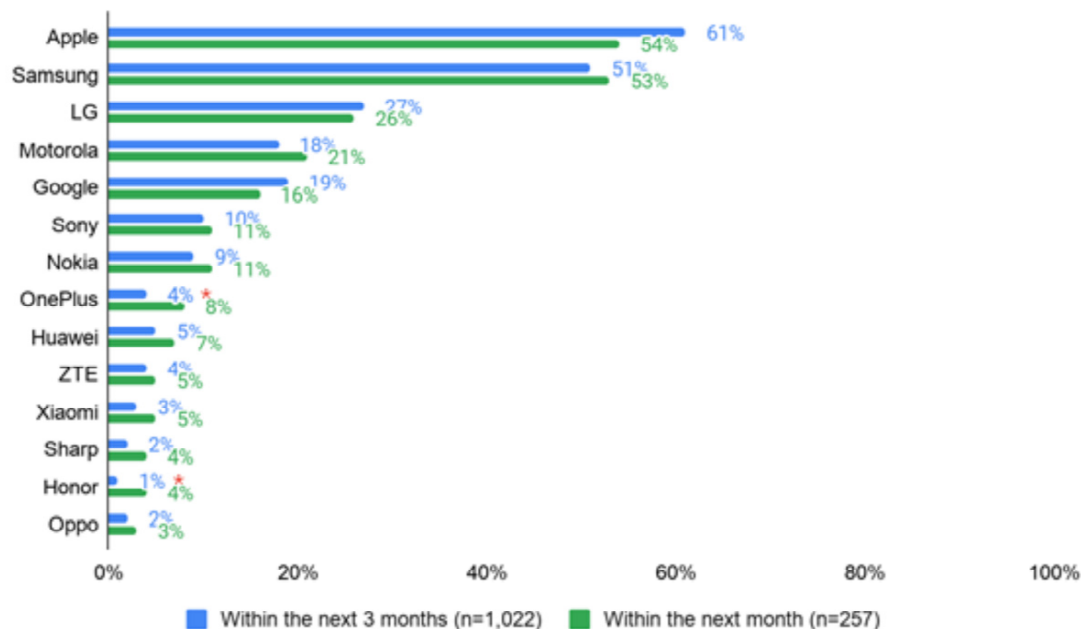
Awareness of Samsung, LG, Motorola and Nokia is lower among likely purchasers who plan to purchase within the next month versus those who intend to purchase further out. Likely purchasers who plan to purchase within the next month are more likely to be aware of Honor compared to those who plan to purchase within the next three months.



Google Which of the following smartphone brands have you heard of? Asked of likely purchasers.  
 \* / \* indicates statistically significant differences compared to within the next month



Likely purchasers who plan to purchase within the next month are more likely to consider OnePlus and Honor compared to likely purchasers who plan to purchase within the next three months



Google When purchasing this smartphone, which smartphone brand(s) will you consider? Asked of likely purchasers.  
 \*/\* indicates statistically significant differences compared to within the next month

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# Recent Purchasers

Google





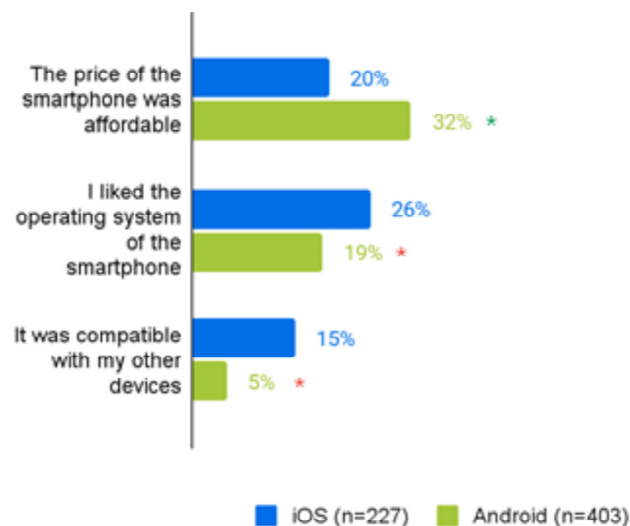
# About one quarter bought their smartphone because they liked the brand

Yet Android purchasers mention affordability of their phone more so than iOS purchasers.

Top Reasons for Smartphone Purchase



Top Reasons for Smartphone Purchase - OS Differences

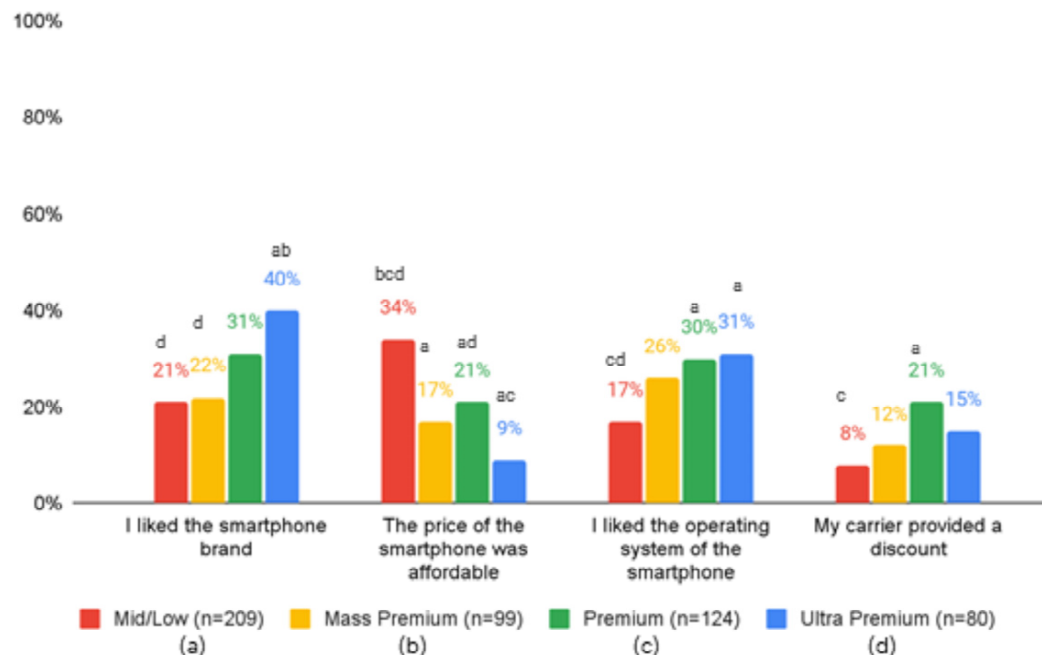


Google What were your top 3 reasons why you purchased? Asked of recent purchasers (n=650)

\* / \* indicates statistically significant difference between iOS and Android users.



Recent purchasers in the Ultra Premium tier were more likely than the Mid/Low and Mass Premium tiers to have purchased their device because they liked the smartphone brand. Discounts were more likely to motivate Premium tier purchasers than Mid/Low tier purchasers.



Google What were your top 3 reasons why you purchased? Asked of recent purchasers (n=650).  
Tiering is based on models and lowercase letters indicate statistically significant to group.

- Tier Definitions:
- Ultra Premium (\$950+)
- Premium (\$700-\$950)
- Mass Premium (\$400-\$699)
- Mid/Low (Less than \$400)



Gen Z and Millennials are more likely than Gen X and Baby Boomers to have purchased because of a compelling advertisement. Millennials were more likely than Gen X and Baby Boomers to say the smartphone's appearance and customer reviews were factors in their purchase.

	Gen Z (n=68) (a)	Millennial (n=217) (b)	Gen X (n=183) (c)	Baby Boomers (n=161) (d)
I liked the smartphone brand	22% (c)	25% (c)	34% (a,b)	29%
The price of the smartphone was affordable	19% (d)	21% (d)	29%	32% (a,b)
My prior smartphone stopped working or slowed down	14% (c,d)	22% (d)	27% (a,d)	37% (a,b,c)
I liked the operating system of the smartphone	17%	21%	20%	28%
I liked how the smartphone looks	15%	20% (c,d)	12% (b)	8% (b)
It had good customer reviews	14%	17% (c,d)	8% (b)	10% (b)
It was recommended to me from my friends / family	5% (b)	14% (a,c)	6% (b)	11%
I saw a compelling advertisement	18% (c,d)	9% (c,d)	3% (a,b)	2% (a,b)
My friend got one and I needed to have it	12% (c,d)	5%	2% (a)	2% (a)
It was compatible with my other devices	4% (b,d)	11% (a)	8%	14% (a)
My carrier provided a discount	16%	11%	12%	16%

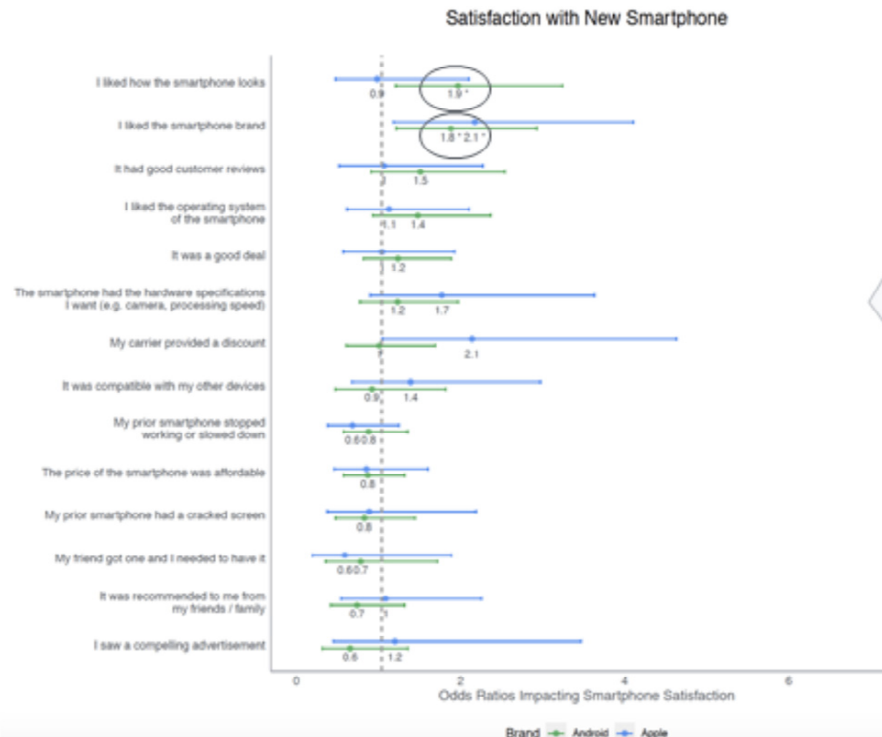


What were your top 3 reasons why you purchased? Asked of recent purchasers.

Lowercase letters indicate statistically significant to group and green shading indicates top two reasons for purchasing in each generational group.



## Recent purchasers are more likely to be satisfied with their new Android smartphone if they like the brand and the way it looks



### How to interpret this chart:

Odds ratios greater than 1 increase the odds of satisfaction and odds ratios less than 1 decrease the odds the satisfaction.

\* indicates a statistically significant effect. The error bars are graphical representations of the variability of these data.



IV: Why did you decide to purchase the specific smartphone you purchased? Please select all that apply.

DV: How satisfied or dissatisfied are you with the brand smartphone you purchased? Asked of recent purchasers (n=650)

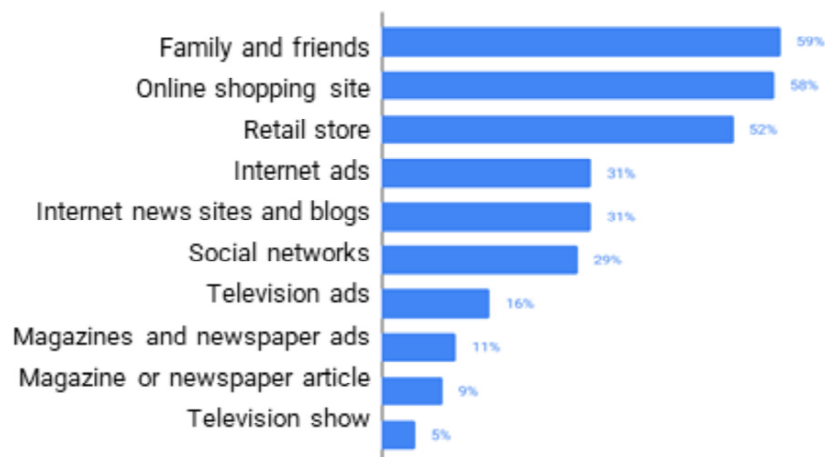
- The graph reports odds ratios from a logistic regression predicting satisfaction with reasons for smartphone purchase. Odds ratios > 1 increase the odds of satisfaction, odds ratios < 1 decrease the odds of satisfaction; \* next to coefficient indicates a statistically significant effect at  $p < 0.05$ .



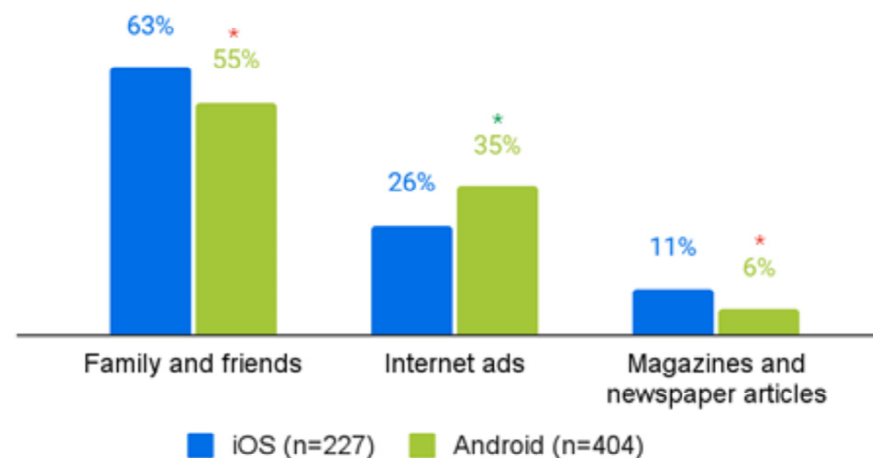
# More than half reported online shopping sites, friends and family, and retail stores as most influential in purchase

iOS purchasers were more likely than Android purchasers to say family and friends influenced their purchase choice.

Top Influences in Smartphone Purchase



Top Influences in Smartphone Purchase - OS Differences



Which of these sources were the most influential in your smartphone purchase choice?  
Select top three. Asked of recent purchasers (n=650)

\* / \* indicates statistically significant difference between iOS and Android users.



Gen Z and Millennial are the most likely to have been influenced by social networks. Baby Boomers and Gen X are more likely to have been influenced by a retail store.

	Gen Z (n=68) (a)	Millennial (n=218) (b)	Gen X (n=183) (c)	Baby Boomers (n=161) (d)
Online shopping site	52%	57%	64%	56%
Family and friends	58%	59%	57%	61%
Retail store	38% (c,d)	43% (c,d)	55% (a,b)	63% (a,b)
Internet ads	39%	37% (c,d)	27% (b)	27% (b)
Internet news sites and blogs	27%	28% (d)	30%	38% (b)
Social networks	43% (c,d)	40% (c,d)	24% (a,b)	17% (a,b)
Television ads	17%	12% (c)	23% (b,d)	14% (c)
Magazines and newspaper ads	14%	14% (d)	9%	7% (b)
Magazine or newspaper article	6% (d)	5% (d)	5% (d)	16% (a,b,c)
Television show	7%	6% (d)	6% (d)	1% (b,c)

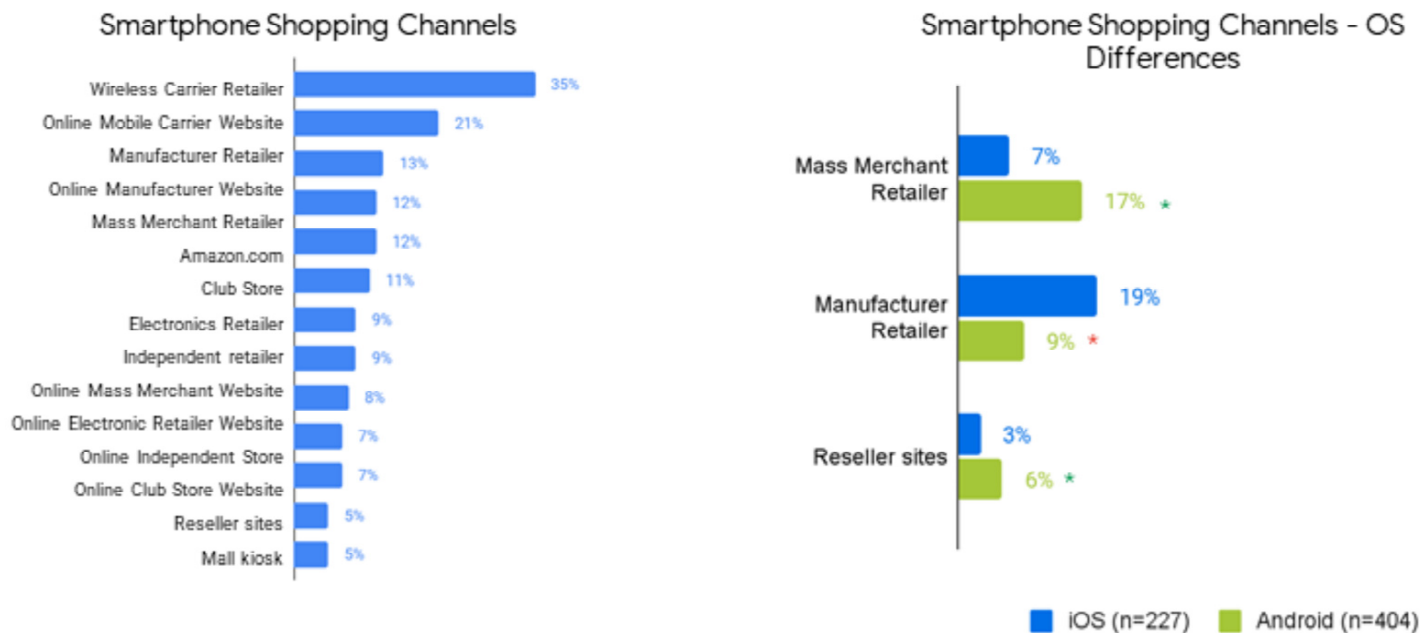
Google

Which of these sources were the most influential in your smartphone purchase choice? Select top three. Asked of recent purchasers.  
Lowercase letters indicate statistically significant to group and green shading indicates top two sources for purchasing in each generational group.



# Just over one-third shopped for their smartphone at a wireless carrier retailer

Android purchasers were more likely than iOS purchasers to have shopped at a mass merchant retail store



Google At which of the following retailers did you shop for your smartphone? Please select all that apply. Asked of recent purchasers (n=650); showing channels with 5%+

\* / \* indicates statistically significant difference between IOS and Android users.





## Gen Z are more likely to shop for smartphones at manufacturer retailers

	Gen Z (n=68) (a)	Millennial (n=218) (b)	Gen X (n=183) (c)	Baby Boomers (n=161) (d)
Independent Retailer	15% (d)	10% (d)	6%	2% (a,b)
Manufacturer Retailer	27% (b,c,d)	14% (a)	11% (a)	10% (a)
Wireless Carrier Retailer	28%	31%	37%	40%
Mall kiosk	3%	5% (d)	2% (d)	0% (b,c)
Mass Merchant Retailer	13%	11%	14%	11%
Electronics Retailer	10%	16% (c,d)	5% (b)	5% (b)
Club Store	10%	17% (c,d)	6% (b)	5% (b)
<a href="#">Amazon.com</a>	15%	15% (d)	10%	8% (b)
Online Independent Store	8%	6%	5%	2%
Online Manufacturer Website	25% (c,d)	17% (c,d)	8% (a,b)	5% (a,b)
Online Mobile Carrier Website	16% (d)	23%	18% (d)	28% (a,c)
Online Mass Merchant Website	10%	11% (c,d)	5% (b)	4% (b)
Online Electronic Retailer Website	13% (d)	10% (d)	6%	3% (a,b)
Online Club Store Website	8% (d)	7% (d)	4%	1% (a,b)
Reseller sites	6%	6% (d)	4%	2% (b)
Some other store or website	2%	3%	5%	5%

Google At which of the following retailers did you shop for your smartphone? Please select all that apply. Asked of recent purchasers (n=650)  
 Lowercase letters indicate statistically significant to group and green shading indicates top two sources for purchasing in each generational group.





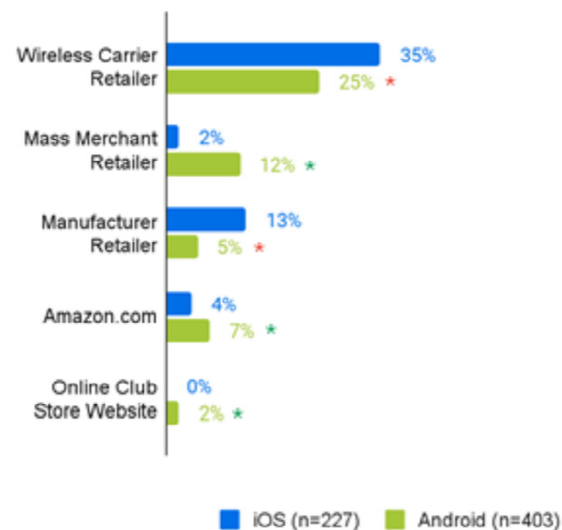
# Just under one-third actually purchased their smartphone from a wireless carrier retailer

Android purchasers were more likely than iOS purchasers to have purchased their smartphone at a mass merchant retail store, via Amazon or an online club store.

Smartphone Purchase Channel



Smartphone Purchase Channel - OS Differences



**Google** From which of the following retailers did you actually purchase your smartphone? Please select one response. Asked of recent purchasers (n=650); showing channels with 3%+

\* / \* indicates statistically significant difference between iOS and Android users.



## More Gen X and Baby Boomers purchase their smartphones from wireless carrier retailers

	Gen Z (n=68) (a)	Millennial (n=217) (b)	Gen X (n=182) (c)	Baby Boomers (n=161) (d)
Wireless Carrier Retailer	23% (d)	22% (c,d)	34% (b)	37% (a,b)
Online Mobile Carrier Website	7% (b,c,d)	14% (a,d)	16% (a,d)	25% (a,b,c)
Manufacturer Retailer	14%	9%	5%	7%
Mass Merchant Retailer	9%	5%	8%	9%
Online Manufacturer Website	15% (c,d)	9% (d)	5% (a)	2% (a,b)
<a href="#">Amazon.com</a>	14% (d)	6%	5%	4% (a)
Independent Retailer	6%	7% (d)	5% (d)	1% (b,c)
Electronics Retailer	4%	7% (c,d)	3% (b)	2% (b)
Club Store	3%	6% (c)	2% (b)	2%
Online Mass Merchant Website	0% (b,c)	3% (a)	3% (a)	1%
Online Independent Store	1%	2%	2%	2%
Online Electronic Retailer Website	2%	2%	2%	1%
Mall kiosk	0%	2% (d)	2%	0% (b)
Reseller sites	0%	1%	2%	0%
Online Club Store Website	0%	2%	2%	0%

Google From which of the following retailers did you actually purchase your smartphone? Please select one response. Asked of recent purchasers (n=650)  
 Lowercase letters indicate statistically significant to group and green shading indicates top two sources for purchasing in each generational group.



# Thank You